



Customer Service Notes for

Don't Be Too Informal with Participants

While it is important to build relationships with participants, be sure that you are not too informal with them. You want to maintain a level of professionalism with your participants.

Consider your greetings. If you do not know the participant well, refer to her as “Ms. Wilkins.” If you know that she is married, you can refer to her as “Mrs. Wilkins.” Or if she tells you to call her “Wanda,” then by all means do so.

Be mindful of the information that you share about yourself with participants. For example, if the participant asks you how you are doing, refrain from telling them that your son is failing algebra or you just found out that your car needs new brakes.

Also do not share information about one participant with another. An exception would be if you wanted to share a situation another participant faced that would help the participant you are working with. For instance, suppose Ms. Carthon tells you that she can't get her daughter to eat carrots and peas. If you know of another participant who had the same challenge and was able to prepare them differently, it's fine to tell the participant how the other participant prepared the food, without disclosing the identity of the other participant.

Participants will sometimes share very personal information with you. Do not encourage this by responding in a way (such as offering your opinion) that will continue the conversation. For example, if Ms. Tompkins tells you something personal about her boyfriend, try to change the subject.

Also be careful with humor. What you feel is funny may not be funny to others. Plus, you can come across as unprofessional. It goes without saying that you should not be telling jokes to participants.

Even if you are running behind, do not eat in front of participants. This will look unprofessional.

Remember that we are not suggesting that you be robotic and impersonal with participants. You can still be pleasant and helpful without being too informal.

Questions for Reflection

1. Are you discreet in the sharing of your own personal information with participants?
2. Are you careful with your use of humor with participants and co-workers?

